Agnew Law Office, P.C.
A Family Estate Planning Law Firm

ESTATE PLANNING
FINANCIAL INFORMATION

CONFIDENTIAL
COVERED BY ATTORNEY-CLIENT PRIVILEGE

General Estimates of Values are Sufficient
Precise Values and Account Numbers are NOT Required

Client Name:

	VALUE	OWNED BY	
Bank Accounts			
Checking	$________________	❑ Self	❑ Joint with __________
Savings	$________________	❑ Self	❑ Joint with __________
CDs	$________________	❑ Self	❑ Joint with __________
Money Market	$________________	❑ Self	❑ Joint with __________
Investment Assets	[Non-IRA or 401(k) Accounts- see next page for those]		
Mutual Funds	$________________	❑ Self	❑ Joint with __________
Stocks	$________________	❑ Self	❑ Joint with __________
Bonds	$________________	❑ Self	❑ Joint with __________
______________	$________________	❑ Self	❑ Joint with __________
Real Estate			
Residence	$________________	❑ Self	❑ Joint with __________
Vacation	$________________	❑ Self	❑ Joint with __________
Commercial	$________________	❑ Self	❑ Joint with __________

Retirement Accounts

IRAs	$__________________	❑ Self
IRAs	$__________________	❑ Self
401(k)	$__________________	❑ Self
401(k)	$__________________	❑ Self
403(b)	$__________________	❑ Self
Roth IRA	$__________________	❑ Self
______________	$__________________	❑ Self

Annuities

Annuity	$__________________	❑ Self	❑ Joint with __________
Annuity	$__________________	❑ Self	❑ Joint with __________

Life Insurance (Death Benefit)

Permanent	$__________________	❑ Self	❑ Joint with __________
Permanent	$__________________	❑ Self	❑ Joint with __________
Term	$__________________	❑ Self	❑ Joint with __________
Term	$__________________	❑ Self	❑ Joint with __________

Business Assets

LLC	$__________________	❑ Self	❑ Joint with __________
LLC	$__________________	❑ Self	❑ Joint with __________
Corporation	$__________________	❑ Self	❑ Joint with __________
Corporation	$__________________	❑ Self	❑ Joint with __________
Partnership	$__________________	❑ Self	❑ Joint with __________
______________	$__________________	❑ Self	❑ Joint with __________

Stuff That Doesn't Fit Anywhere Else

______________	$__________________	❑ Self	❑ Joint with __________
______________	$__________________	❑ Self	❑ Joint with __________

Name of Financial Advisor: *(If Any)* ____________________________________

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ESTATE PLANNING
REAL ESTATE INFORMATION

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Client Name:

ADDRESS	STATE	PARCEL IDENTIFICATION NUMBER (PIN)

**Please provide the last deed on record for the real estate listed above along with the most recent tax bill. If you don't have a copy of the last deed on record, you can obtain one by calling the county recorders office. To obtain a copy of the tax bill, you can call the county assessors office.*

Please note a deed differs from a survey, a mortgage release and a mortgage satisfaction. For the most accurate information, we need the last deed on record.